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Wealthtech Weekly

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By Rob Burgess
Reporter

In the latest edition of "Show Me Your Stack," Joe McQuaid discussed the importance of going the distance.

In the next 10 years, he said he plans to run in the six world marathon majors and scale the Seven Summits — the highest mountains on each continent.

McQuaid, managing director of platform solutions and advisor experience at Concurrent Investment Advisors, is currently focused on building a data lakehouse to help the firm promote stamina.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

SHOW ME YOUR STACK

Advisor tech choices for the long run: Show Me Your Stack

When he's not preparing to climb the world's highest mountains and run the major marathons, Joe McQuaid, managing director of platform solutions and advisor experience, ensures Concurrent Investment Advisors' tech stack has stamina.

- **Finserv firms view AI tools as important but lack proper oversight**
  A recent Smarsh survey found that although 79% of finserv firms view AI as critical to the sector's future and 81% of large firms feel pressured to adopt

AI to stay competitive, only 32% have formal AI governance programs in place.

- **Financial advisor confidence plummets after election**
  The most precipitous drop of any category was in asset allocation, as advisors signaled they would be less aggressive with investments in the new year.
- **A 'very hard soft landing'? Fidelity's 2025 economic forecast**
  These and other issues were the topics of the "2025 Markets & Economy Outlook" webinar Monday with Fidelity Investments.
- **Cover stories, top series: FP's 2024 wealth management deep dives**
  From trending independence to the rise in AI in wealth management, these stories and series dove deep on issues of utmost importance to financial advisors in 2024.

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